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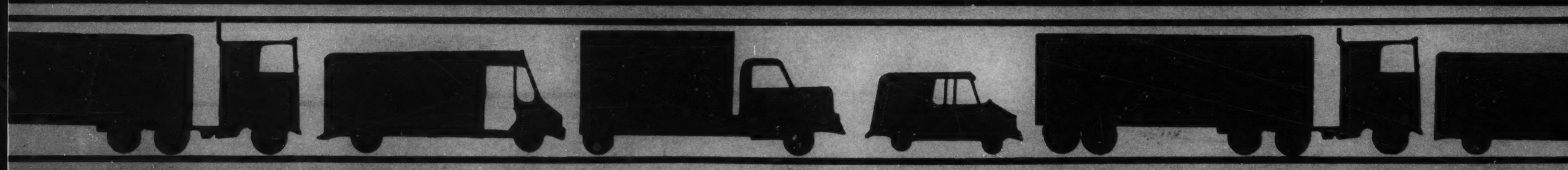
No. 1

Bakery Fleet Transportation Survey

Based on data compiled by the American Bakers Association.



BAKING equipment

Bakers' fleet profiled in truck census: types, engines, numbers, fuels, age, costs

Annual fleet fuel bill comes to $100 million, as vans, trucks & trailers travel 1 billion miles

This census, prepared by the Fleet Executives Committee of the American Bakers Association, provides basic information about the size, distribution and fuel usage pattern of the industry's fleet. Ira Dorfman, A.B.A. staff member who supervised preparation of the census, noted that it gives the association a statistical tool to help build lobbying positions on issues involving both trucking and energy policy.

"From a federal perspective," Mr. Dorfman said, "there are many regulations and laws that will affect the fleet. In the past, it has been difficult to assess the impact of all this on the industry.

"Presently, there is a new tax being considered on diesel fuel. Even with discussions in the A.B.A. Fleet Executives Committee, we can't really assess what this law will mean for the baking industry without numbers. With the data from the survey, we can plug the numbers into a formula and get a real idea of the significance of the legislation."

Such data give A.B.A.—and the rest of the baking and allied industries—a powerful tool. "In Washington, very few lobbyists have hard data to back up their statements. Figures are very persuasive. They make you more credible," said Mr. Dorfman.

Another motivation for conducting this first truck census was to assist fleet equipment manufacturers to better know the baking industry.

"The numbers will help convince people [at the fleet supplier] company to develop new products for our industry," he said. "These people can now go to their superiors with hard numbers about the potential of the market for the products."

Samples 40% of known universe

The total number of vehicles represented in the census—48,178 operated by 94 baking companies and 2,095 operated by 34 allied companies—can be conservatively considered as representing about 40% of the total fleet, according to A.B.A. (This would indicate a total baking fleet of some 120,000 vehicles.) It is well to note, however, that this study involves 15 baking companies operating more than 500 vehicles each.

Total number of vehicles	50,273	(100%)
Total number of baking companies	94	(96%)
Total number of allied companies	34	(4%)
Total number of walk-in/route vans	35,462	(71%)
Total number of trailers	5,766	(11%)
Total number of tractors	4,066	(8%)
Total number of cars	3,895	(8%)
Total number of straight trucks	1,084	(2%)

Finds heavier trucks in use

The truck census revealed higher-than-expected numbers of heavier trucks involved in baking fleet operations. "We thought that 90-95% of all trucks were under 10,000 lb. Many, many more than we thought are heavier," Mr. Dorfman explained. **Table 1** notes that 31% of the counted 39,741 trucks exceed the 10,000-lb range in gross vehicle weight (GVW). Truck ownership patterns stayed fairly consistent among various sized fleets **(Tables 2, 3 and 4),** although the heaviest concentration of walk-in/route vans was among companies operating the largest fleets:

Fleet size:	Walk-in/ route vans	Straight trucks	Tractors
15 bakeries, fleet size: >500 (33,678 trucks)	89%	3%	8%
19 bakeries, fleet size: 151-500 (3,604 trucks)	82%	4%	12%
60 bakeries, fleet size: ≤150 (2,459 trucks)	77%	4%	19%

Table 1: **Number of Vehicles**
(94 baking companies)

Type	Number counted	%
Walk-in/route vans		
10,000 lb GVW or less (27,313)		69%
10,001-15,000 lb GVW (7,532)		19%
15,001-19,500 lb GVW (281)		0.7%
Medium trucks (transports)		
19,501-26,000 lb GVW (496)		1%
26,001-33,000* lb GVW (445)		1%
Tractors		
Medium, 2-axle (2,989) 50,000 lb GCW or less		8%
Heavy, 3-axle (685) over 50,000 lb GCW		2%
TOTAL (39,741)		

*Totals include 16 heavy trucks (over 33,000 lb GVW).

Table 2: **Number of Vehicles at companies with more than 500 trucks**
(15 baking companies)

Type (Number)	% of all trucks (Table 1)
Walk-in/route vans	
10,000 lb GVW or less (23,766)	87%
10,001-15,000 lb GVW (6,331)	84%
15,001-19,500 lb GVW (165)	59%
Medium trucks (transports)	
19,501-26,000 lb GVW (251)	51%
26,001-33,000* lb GVW (369)	83%
Tractors	
Medium, 2-axle (2,398) 50,000 lb GCW or less	80%
Heavy, 3-axle (398) over 50,000 lb GCW	58%
TOTAL owned by these companies (33,678)	**85%**

*Totals include 5 heavy trucks (over 33,000 lb GVW). One "truck" symbolizes 10% of the Table 1 total.

Table 3: **Number of Vehicles at companies with 151-500 trucks**
(19 baking companies)

Type (Number)	% of all trucks (Table 1)
Walk-in/route vans	
10,000 lb GVW or less (2,328)	9%
10,001-15,000 lb GVW (540)	7%
15,001-19,500 lb GVW (92)	33%
Medium trucks (transports)	
19,501-26,000 lb GVW (211)	43%
26,001-33,000* lb GVW (11)	2%
Tractors	
Medium, 2-axle (299) 50,000 lb GCW or less	10%
Heavy, 3-axle (123) over 50,000 lb GCW	18%
TOTAL owned by these companies (3,604)	**9%**

*Totals include 7 heavy trucks (over 33,000 lb GVW). One "truck" symbolizes 10% of the Table 1 total.

A.B.A. has been actively trying to change regulations on heavier route trucks, and this finding gives pro-baker lobbyists strong ammunition in the fight to get such rules altered.

Almost one fifth of the baking fleet involves over-the-road tractor-trailer equipment. The census identified 3,674 tractors and 5,013 trailers being operated by bakers. Medium tractors—2-axle construction, weighing, 50,000 lb gross cargo weight (GCW), or less—compose 81% of the tractor census, as opposed to the heavier 3-axle tractors, weighing more than 50,000 lb, GCW **(Table 1).** However, tandem axle trailers far outnumbered any other variety of trailer operated by bakers. The census counted 752 (15%) single-axle trailers; 3,838 (77%) tandem-axle units; 369 (7%) refrigerated trailers. The rest of the bakers' trailer inventory involved 47 dry bulk (flour, sugar, etc.) trailers, two convertors and five "others."

Single-axle	752
Tandem-axle	3,838
Refrigerated (reefers)	369
Dry bulk (flour trailer, sugar, etc.)	47
Other	5
Convertors	2

Table 4: **Number of Vehicles at companies with 150 or less trucks**
(60 baking companies)

Type (Number)	% of all trucks (Table 1)
Walk-in/route vans	
10,000 lb GVW or less (1,219)	4%
10,001-15,000 lb GVW (661)	9%
15,001-19,5000 lb GVW (24)	9%
Medium trucks (transports)	
19,501-19,500 lb GVW (34)	7%
26,001-33,000* lb GVW (65)	15%
Tractors	
Medium, 2-axle (292) 50,000 lb GCW or less	10%
Heavy, 3-axle (164) over 50,000 lb GCW	24%
TOTAL owned by these companies (2,459)	**6%** **6%**

*Totals include 4 heavy trucks (over 33,000 lb GVW). One "truck" symbolizes 10% of the Table 1 total.

Throughout the census, the dominant pattern was for company-owned vehicles, accounting for 82% of all baker-operated vehicles. Most of the leased vehicles fell into the "truck" category, with 5,918 (16% of total) being leased: 5,445 on a lessor take-back arrangement and 473 on a full-service basis. One-third of the 3,415 total cars reported in the census were leased, with lessor take-back dominating 2:1 (685:313 in actual count) over full-service arrangements. The 80% own-versus-lease pattern was also present for tractors and trailers. Among tractors in the baking fleet, 2,890 were company-owned and 784 leased (455 full-service and 329 on a lessor take-back basis). Trailers owned by baking companies numbered 4,090 of the total 5,013 (533 were leased on a take-back basis, 390 were leased full-service).

Fleet fuel equation

The dominant fuel which powers the baking fleet was gasoline, and bakers reported 63% (25,076 vehicles) as having gasoline engines **(Table 5).** Indeed, the portion of the baking industry represented here pays nearly $100 million annually to fuel its fleet **(Tables 6 and 7).** Figuring that the A.B.A. survey covered 40% of the total baking universe, the annual fuel bill could run as high as $242 million. (Survey respondents reported gallons of fuel bought. Total fuel costs were projected using average fuel prices from August 1983 U.S. Dept. of Transportation statistics.)

The distribution of fuels confirms well-known patterns and suggests new thinking about emerging alternative fuels. Most light-weight (10,000 lb GVW or less) walk-in/route vans were gasoline powered, although 4,589 (17%) of the total 27,313 light vans used propane, and another 10 were noted to be electric powered. A dramatic change in engine style occurred as the weight rating of the bakers' walk-in/route vans increased. Among vehicles rated up to 5,000 lb more—the category of walk-in/route vans weighing 10,000 to 15,000 lb GVW—57% (4,326 of the total 7,532 total vehicles in this category) were diesel powered. While 2,792 (37%) used gasoline, 399 were propane fueled and 15 burned compressed natural gas (CNG); however, the 281 walk-in/route vans rated at 15,000 to 19,500 lb GVW used mostly gasoline engines, 87% **(Table 8).**

Medium trucks (transports) tended to be gasoline-fueled: 417 (84%) of the 496 lighter weight (19,501-26,000 lb GVW) units and 250 (58%) of the 429 heavier weight (26,001-33,000 lb GVW) trucks **(Table 9).** All 16 of the heavy trucks, those weighing more than 33,000 lb GVW, had diesel engines.

Diesel, too, was the overwhelming engine choice for bakery fleet tractors **(Table 10).** Among medium-sized, 2-axle tractors, 83% (2,485 of the total 2,989) had diesel engines, although six were propane-fueled. The rest (498) used gasoline engines. The 685 heavy-duty, 3-axle tractors were 99% diesel-fueled, with just seven gasoline engines in the reported results.

Repowering & conversion activity

In recent years, many fleet executives in the baking industry have voiced interest in converting existing vehicles for better fuel efficiency, either repowering chassis with diesel engines or converting to propane, CNG or other engine fuels. The census reported that 6,004 (22%) of the 27,313 light-weight (10,000 lb GVW or less) walk-in/route vans have been repowered or converted: 1,342 repowered with diesel; 4,581 converted to propane and 81 converted to CNG. Altogether, 6,622 (19%) of the 35,126 walk-in/route vans of all classes were noted for such engine and/or fuel changes: 1,521 repowered with diesel; 5,005 converted to propane; and 96 converted to CNG. Diesel was the choice for 20 of the 28 converted medium trucks in the 19,501-26,000-lb-GVW range, and propane conversion was done to 60 of the 61 reported medium trucks (26,001-33,000 lb GVW). In all, bakers reported that 6,748 trucks (14% of the total) had been so converted or repowered. Propane was the choice for three quarters of all trucks converted.

Walk-in/route vans changed	6,622
Straight trucks changed	90
Tractors changed	36

"The breakdown of gas/propane/diesel powered engines is interesting," commented Mr. Dorfman. "More vehicles used propane than we would have guessed. It isn't just an experiment, and propane issues can't just be brushed aside."

Travels one billion miles annually

The bakers' fleet measured in this census covers nearly one billion miles annually **(Table 11).** The average walk-in/route van is driven annually the equivalent of three quarters the way around the Earth.

Mileage figures confirmed a "quantum jump" pattern in the miles traveled by the different classifications of vehi-

Table 5: **Fuels Used: All Vehicles**

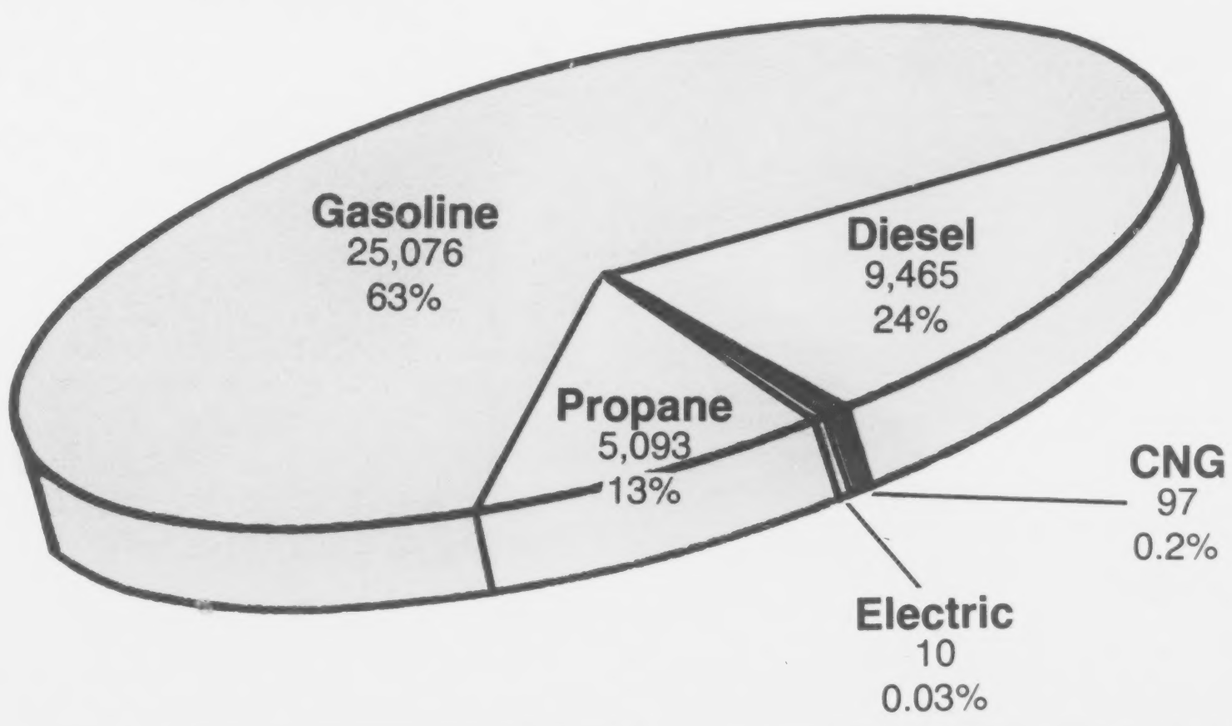


Table 6: **Fuels and Costs**
Total amount of fuel used

Type	Gallons
Gasoline	44,220,652
Diesel	51,939,425
Propane	15,732,244
CNG	125,000

0 11,000,000 22,000,000 33,000,000 44,000,000 55,000,000

Table 7: **Fuels and Costs**
Total cost of fuel used

Type	Price/gal*	Total cost
Gasoline	99¢	$43,778,445
Diesel	82¢	$42,590,328
Propane	66¢	$10,383,281
CNG	60¢	$75,000
TOTAL		$96,827,054

*Average price during July 1983 (CNG price is average for 1983 Received) according to U.S. Dept. of Transportation.

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Motor Vehicle Manufacturers Association of the United States, Inc.: December 21, 1971 through December 21, 1982, Report FS-20.

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P30 Value Van 14'6" Aluminum.

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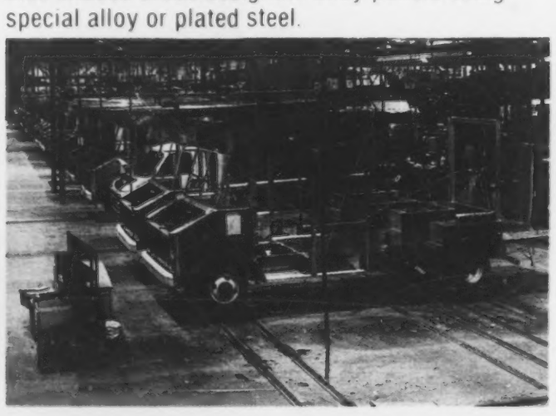

Assembly line for aluminum bodies.

Step-Van/Value Van Steel. Aluminum bodies available.

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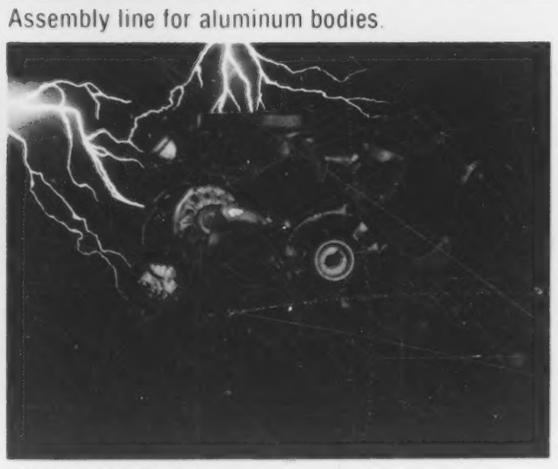

6.2 Liter V-8 Diesel.

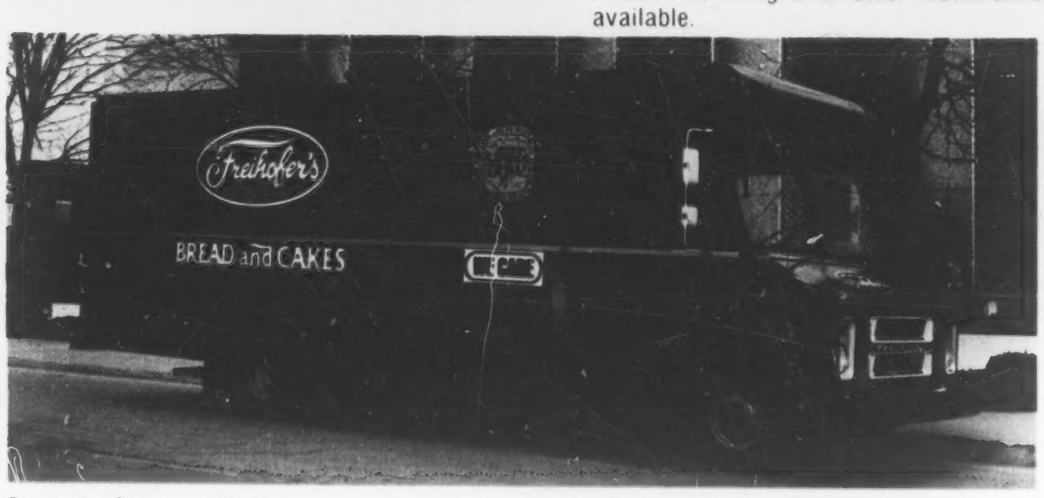

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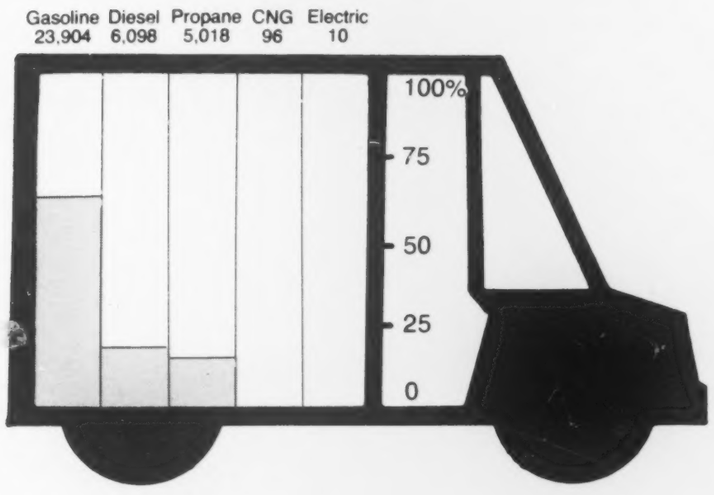
Table 8: **Fuels Used: Walk-in/Route Vans**



cles. The light-weight, walk-in/route vans showed averages in the mid-to-upper "teens," while heavier straight trucks averaged 4,000 to 14,000 more miles per year. The heaviest mileage, of course, was that logged by the tractors: almost 80,000 miles annually for each of the vehicles reported in the census. That's the equivalent of 3¼ times the circumference of the Earth.

In direct contrast—but not unexpectedly—the number of stops per day decreased as vehicle size and weight increased.

Walk-in/route vans (≤10,000 lb GVW)	31 stops
Walk-in/route vans (10,001-15,000 lb GVW)	26 stops
Walk-in/route vans (15,001-19,500 lb GVW)	28 stops
Medium trucks (19,501-26,000 lb GVW)	11 stops
Medium trucks (26,001-33,000 lb GVW)	15 stops
Heavy trucks (>33,000 lb GVW)	10 stops
Medium tractors, 2-axle	7 stops
Heavy tractors, 3-axle	4 stops

One thing that remained surprisingly constant, however, were the top speeds reported by bakers for their fleets: every vehicle category was rated in the narrow range of averages 54 to 58 mph. The only exception were the heaviest of the walk-in/route trucks, those weighing 15,001-26,000 lb GVW, which averaged 44 mph in top speed.

Early readers of this truck census were somewhat surprised at the city-street driving versus highway driving ratios reported for the walk-in/route vans **(Table 12).** The higher-than-expected percentages for highway driving of these lighter vehicles might be laid to the widening service radii for today's baking plants. In addition, most large cities—even modest-sized metropolitan areas—have well-established highway and expressway systems. More statistical work here would clarify this result.

Vehicle, chassis age surveyed

Questions about vehicle age, too, produced slightly higher totals than might be expected: 39% of the vehicles in the bakers' fleet are 10 or more years old **(Table 13).** Among the walk-in/route vans, age was more evenly distributed, with 44% (15,501) of the total 35,126 units older than 10 years.

Walk-in/route vans		
<5 years old	9,361	(27%)
5-10 years old	10,264	(29%)
10-15 years old	10,289	(29%)
>15 years old	5,212	(15%)

Medium and heavy trucks tended to be newer, with 85% (803) of the total 941 vehicles 10 or fewer years old. This was also the pattern among tractors, with 81% (2,993) of the total 3,674 vehicles 10 or fewer years old, although 41% were fewer than five years old.

Trucks <5 years old	250	(27%)
Trucks 5-10 years old	553	(59%)
Trucks 10-15 years old	96	(10%)
Trucks >15 years old	42	(4%)
Tractors <5 years old	1,488	(41%)
Tractors 5-10 years old	1,505	(41%)
Tractors 10-15 years old	586	(16%)
Tractors >15 years old	95	(3%)

Along with overall vehicle age, chassis age was reported by the A.B.A. Truck Census **(Table 14).** Here, too, the lightest weight vehicles—the walk-in/route vans rated at 10,000 lb or less GVW—showed the longest service life: 18.2 years. **(Table 15** reports the weighted averages for service life of the bodies of walk-in/route vans.) Trailer chassis, too, gave bakers many years of active life.

Single-axle trailers	14.6 years
Tandem-axle trailers	15.6 years
Refrigerated trailers (reefers)	9.4 years
Dry bulk trailers	14.6 years

Importance of maintenance

"The age question was most telling," Mr. Dorfman commented. "In gathering the data here, we got calls from company presidents who knew they haven't recently bought new vehicles, but whose eyes were opened—by filling out this survey—to exactly how aged their fleets had become. They realize that if they don't address the age problem now, they will be jeopardizing the ability to deliver their products on a timely basis. Preventive maintenance has been traditionally pushed aside for more popular projects, but now it must become a major priority.

Bakers' perception of parts availability as a source of down time problems ran the entire spectrum: 24% said this was not a problem; 21% noted an infrequent problem; 23% reported a moderate problem; and 10% said that parts availability was a big problem, creating down time. Baking fleets generally found parts for vehicles older than five years in good availability. Census participants reported:

Part:	Good Availability	Poor Availability
Body	51%	16%
Body hardware	58%	11%
Differential	47%	21%
Electrical system	53%	15%
Engine	62%	7%
Suspension	45%	21%
Transmission	44%	22%

Maintenance costs were examined in the A.B.A. Truck Census. Asked about walk-in/route van tires, 51 respondents noted an average annual tire budget of $133,430. During a year, these companies would have spent a total of $6.8 million altogether for tires. This

Table 9: **Fuels Used: Trucks**

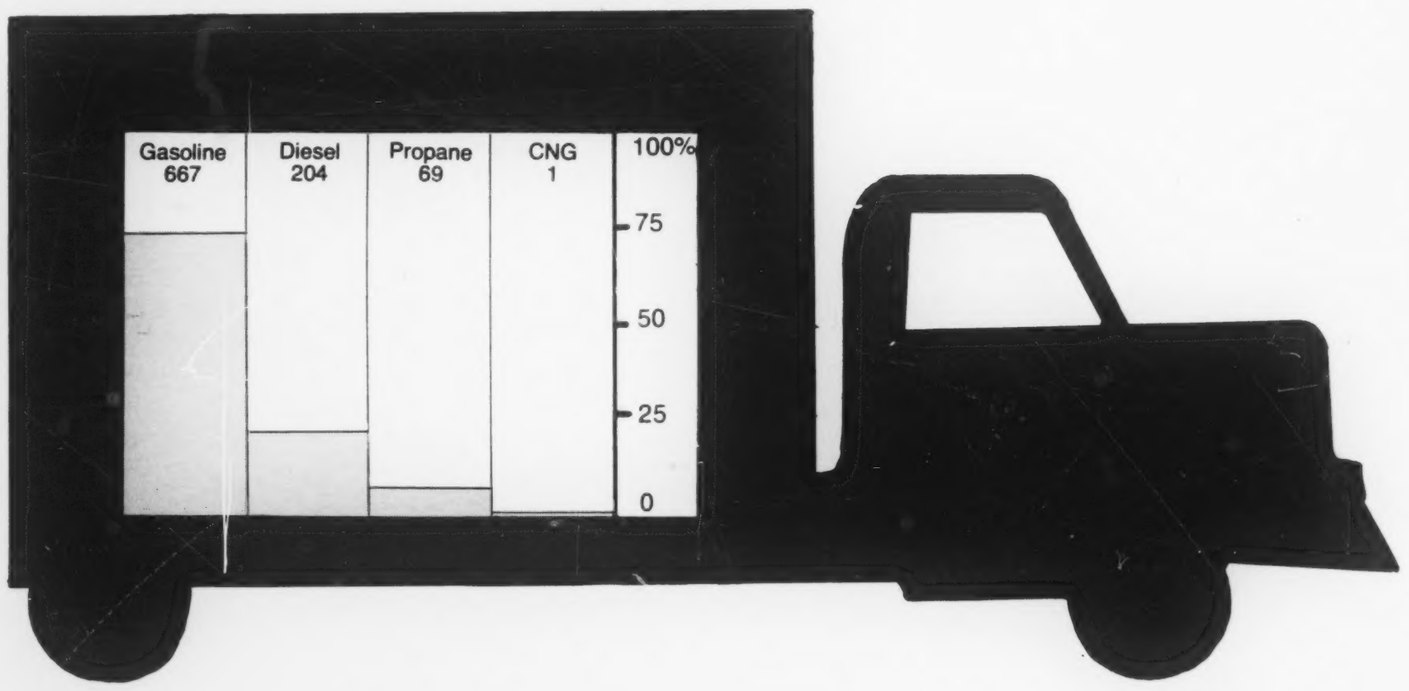
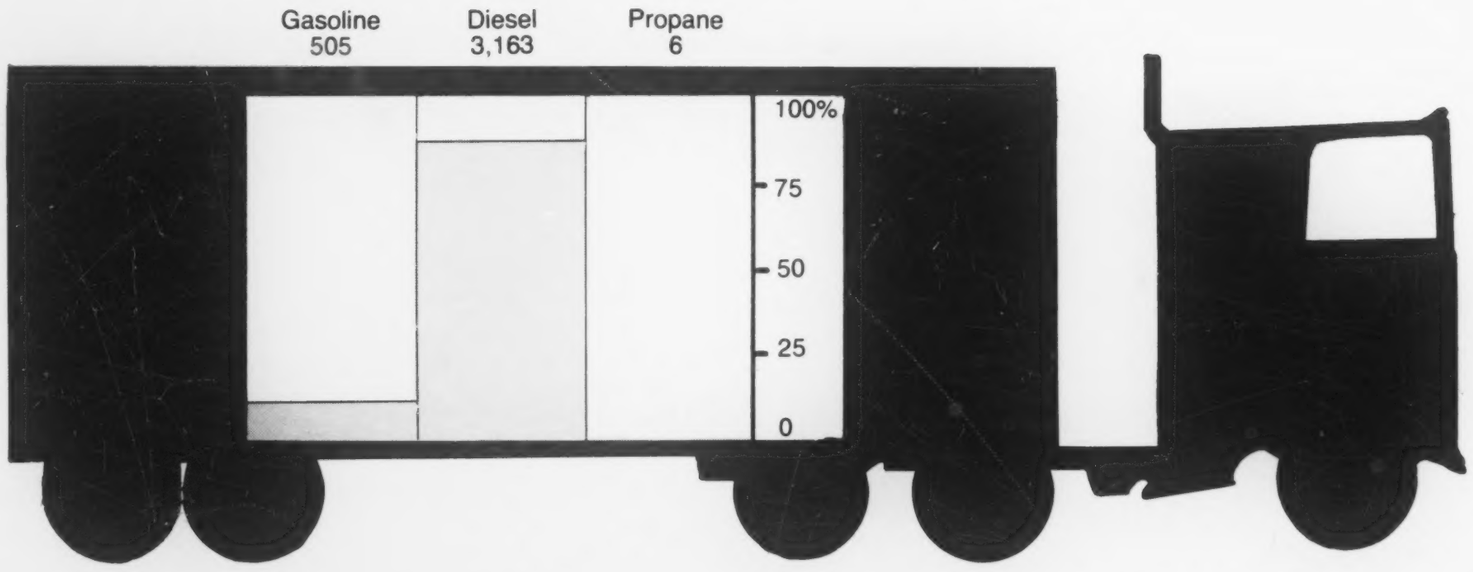


Table 10: **Fuels Used: Tractors**



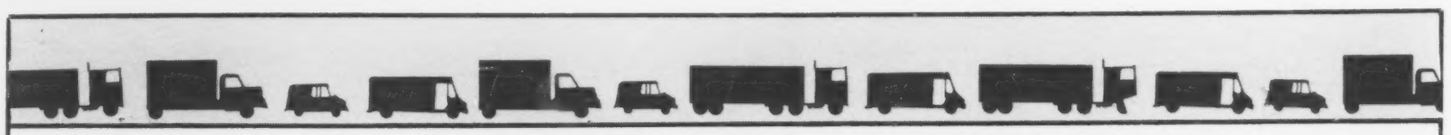


Table 11: **How Many Miles Do They Cover?**

Type (Total miles)	Average (0 — 28,000 — 56,000 — 84,000 — 112,000)
Walk-in/route vans	
10,000 lb GVW or less (536,577,300)	19,645
10,001-15,000 lb GVW (139,820,599)	18,564
15,001-19,500 lb GVW (4,378,510)	15,582
Medium trucks (transports)	
19,501-26,000 lb GVW (11,358,637)	22,900
26,001-33,000 lb GVW (13,925,307)	32,460
Heavy trucks	
Over 33,000 lb GVW (1,782,303)	111,394
Tractors	
Medium, 2-axle 50,000 lb GCW or less (233,734,417)	78,198
Heavy, 3-axle over 50,000 lb GCW (54,694,046)	79,845
TOTAL (996,271,119)	

figure covers 41,581 bias ply tires and 3,282 radial tires.

Bakers reported that engines and transmissions were the major maintenance items, in terms of cost and time, for walk-in/route vans.

Industry practice varies in how much finishing (paint, engine tune, decals, etc.) a baking company requests from the supplier of its new vehicles. Some prefer to do this entirely in-house, while others expect a vehicle to be "road ready" on delivery. Survey respondents said that they spent an average of 12.5 man hours preparing the body and 8 man hours on the chassis of a new vehicle for service once they took delivery.

A continuing project

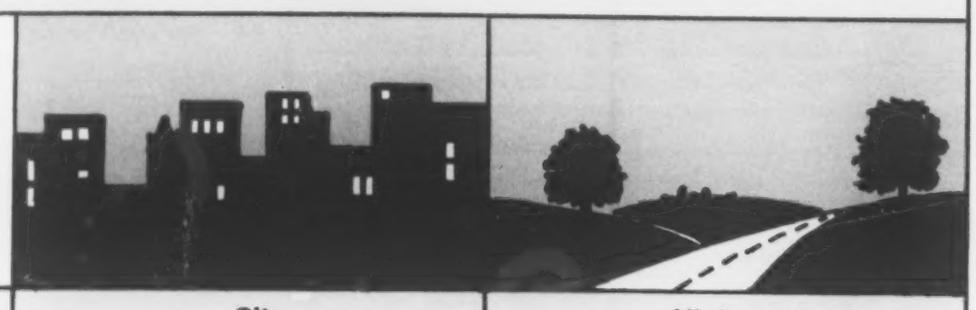
Summarizing the results of the A.B.A. Fleet Executives Committee work, Mr. Dorfman said, "We're pleased with the result. We anticipate putting this data on our in-house computer. The ability to update the data will therefore be easier as we continue the census series." ■

Table 13: **Vehicle Age**

	% 0 10 20 30
Under 5 years old (12,860)	29%
5-10 years old (14,563)	33%
10-15 years old (11,798)	26%
Over 15 years old (5,489)	12%
TOTAL (44,730)	

Table 12: **Where Driven?**

Percentage of driving on city streets v. open highway



Type	City	Highway
	%	%
Walk-in/route vans		
10,000 lb GVW or less	60	40
10,001-15,000 lb GVW	56	44
15,001-19,500 lb GVW	38	62
Medium trucks (transports)		
19,501-26,000 lb GVW	43	57
26,001-33,000 lb GVW	62	38
Heavy trucks		
Over 33,000 lb GVW	29	71
Tractors		
Medium, 2-axle 50,000 lb GCW or less	15	85
Heavy, 3-axle over 50,000 lb GCW	17	83

% 100 80 60 40 20 0 20 40 60 80 100

Table 14: **Average Chassis Life**

Type	Weighted Avg. (Years)
Walk-in/route vans	
10,000 lb GVW or less	18.7
10,001-15,000 lb GVW	16.8
15,001-19,500 lb GVW	10.5
Medium trucks (transports)	
19,501-26,000 lb GVW	14.1
26,001-33,000 lb GVW	10.2
Heavy trucks	
Over 33,000 lb GVW	10.2
Tractors	
Medium, 2-axle 50,000 lb GCW or less	12.2
Heavy, 3-axle over 50,000 lb GCW	7.7

Years 0 5 10 15 20

Table 15: **Average Life of Walk-in/Route Van Bodies**

Vehicle weight	Weighted Ave. (Years) 0 5 10 15 20
10,000 lb GVW or less	19.1
10,001-15,000 lb GVW	17.0
15,001-19,500 lb GVW	10.4

Vehicle type and operating statistics for 94 baking companies, by fleet size

Class 1: Companies with >500 vehicles
(15 baking companies)
39,970 vehicles in total

Vehicle	Total	Company owned	Full-service Lease	Lessor take-back
Cars	2,535	1,664	273	598
Trucks	30,882	25,275	173	5,434
Tractors	2,796	2,320	201	275
Trailers	3,757	3,100	162	495

Vehicle	Engine type Gasoline	Diesel	Propane	CNG
Walk-in/route van*[1]	17,624	1,636	4,415	81
Walk-in/route van[2]	2,076	4,200	40	15
Walk-in/route van[3]	140	1	24	—
Medium truck[4]	211	37	2	1
Medium truck[5]	233	71	60	—
Heavy truck[6]	—	5	—	—
Medium tractor[7]	415	1,982	1	—
Heavy tractor[8]	3	395	—	—

Vehicles converted	Diesel repowered	Propane converted	CNG converted
Walk-in/route van[1]	1,279	4,415	81
Walk-in/route van[2]	150	40	15
Walk-in/route van[3]	1	24	—
Medium truck[4]	10	1	—
Medium truck[5]	—	60	—
Heavy truck[6]	—	—	—
Medium tractor[7]	10	1	—
Heavy tractor[8]	—	—	—

Vehicle age	<5 years	5-10 years	10-15 years	>15 years
Walk-in/route van[1]	7,199	6,266	5,845	4,456
Walk-in/route van[2]	682	2,413	3,109	127
Walk-in/route van[3]	105	60	—	—
Medium truck[4]	48	189	9	5
Medium truck[5]	149	205	8	2
Heavy truck[6]	5	—	—	—
Medium tractor[7]	752	1,119	448	79
Heavy tractor[8]	250	146	2	—
Single-axle trailer	114	157	95	29
Tandem-axle trailer	1,124	1,487	518	83
Reefer	36	78	2	—
Dry bulk & other	6	11	12	5

Vehicle	Average miles driven	Number stops	Top speed mph	Local : Highway
Walk-in/route van[1]	19,782	31	57	56 : 44
Walk-in/route van[2]	18,211	27	50	75 : 25
Walk-in/route van[3]	6,196	35	30	100 : 0
Medium truck[4]	24,167	20	58	58 : 42
Medium truck[5]	32,125	16	58	22 : 78
Heavy truck[6]	—	—	—	—
Medium tractor[7]	80,814	5	56	13 : 87
Heavy tractor[8]	84,972	4	55	15 : 85

Vehicle	Chassis life weighted avg. years	Body life weighted avg. years
Walk-in/route van[1]	18.6	19.5
Walk-in/route van[2]	16.9	17.1
Walk-in/route van[3]	10.0	10.0
Medium truck[4]	13.5	
Medium truck[5]	10.0	
Heavy truck[6]	—	
Medium tractor[7]	12.6	
Heavy tractor[8]	8.6	
Single-axle trailer	15.0	
Tandem-axle trailer	16.4	
Reefer	11.7	
Dry bulk & other	13.5	

References: *Also 10 electric-powered vehicles. [1]<10,000 lb GVW. [2]10,001-15,000 lb GVW. [3]15,001-19,500 lb GVW. [4]19,501-26,000 lb GVW. [5]26,001-33,000 lb GVW. [6]>30,000 lb GVW. [7]<50,000 lb GCW. [8]>50,000 lb GCW.

Class 2: Companies with 151-500 vehicles
(19 baking companies)
4,666 vehicles in total

Vehicle*	Total	Company owned	Full-service Lease	Lessor take-back
Cars	419	400	19	—
Trucks	3,182	3,064	118	—
Tractors	422	300	109	13
Trailers	634	478	136	20

Vehicle	Engine type Gasoline	Diesel	Propane	CNG
Walk-in/route van[1]	2,172	53	103	—
Walk-in/route van[2]	271	51	218	—
Walk-in/route van[3]	84	2	6	—
Medium truck[4]	185	19	7	—
Medium truck[5]	—	4	—	—
Heavy truck[6]	—	7	—	—
Medium tractor[7]	43	256	—	—
Heavy tractor[8]	1	122	—	—

Vehicles converted	Diesel repowered	Propane converted	CNG converted
Walk-in/route van[1]	31	87	—
Walk-in/route van[2]	—	218	—
Walk-in/route van[3]	2	6	—
Medium truck[4]	10	7	—
Medium truck[5]	—	—	—
Heavy truck[6]	—	—	—
Medium tractor[7]	21	—	—
Heavy tractor[8]	1	—	—

Vehicle	Average miles driven	Number stops	Top speed mph	Local : Highway
Walk-in/route van[1]	17,884	31	57	62 : 38
Walk-in/route van[2]	16,128	26	56	60 : 40
Walk-in/route van[3]	28,000	—	—	—
Medium truck[4]	21,774	8	54	41 : 59
Medium truck[5]	8,500	19	47	73 : 27
Heavy truck[6]	140,000	4	60	15 : 85
Medium tractor[7]	73,843	7	57	15 : 85
Heavy tractor[8]	62,228	4	60	22 : 78

Vehicle age	<5 years	5-10 years	10-15 years	>15 years
Walk-in/route van[1]	712	603	580	433
Walk-in/route van[2]	110	155	275	—
Walk-in/route van[3]	—	92	—	—
Medium truck[4]	10	123	57	21
Medium truck[5]	—	4	—	—
Heavy truck[6]	3	4	—	—
Medium tractor[7]	115	98	72	11
Heavy tractor[8]	95	25	3	—
Single-axle trailer	58	9	56	24
Tandem-axle trailer	152	136	46	2
Reefer	22	97	2	—
Dry bulk	2	—	4	2

Vehicle	Chassis life weighted avg. years	Body life weighted avg. years
Walk-in/route van[1]	14.4	16.7
Walk-in/route van[2]	15.6	15.9
Walk-in/route van[3]	10.0	10.0
Medium truck[4]	15.6	
Medium truck[5]	17.5	
Heavy truck[6]	12.0	
Medium tractor[7]	10.2	
Heavy tractor[8]	5.5	
Single-axle trailer	16.8	
Tandem-axle trailer	11.3	
Reefer	9.8	
Dry bulk	19.6	

References: *Other vehicles: 9. [1]<10,000 lb GVW. [2]10,001-15,000 lb GVW. [3]15,001-19,500 lb GVW. [4]19,501-26,000 lb GVW. [5]26,001-33,000 lb GVW. [6]>30,000 lb GVW. [7]<50,000 lb GCW. [8]>50,000 lb GCW.

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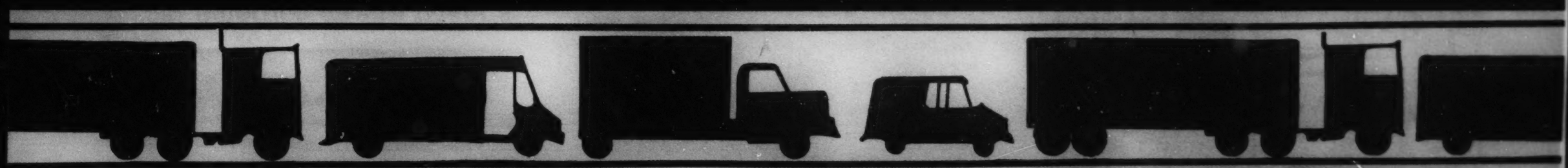
No. 2

Bakery Fleet Transportation Survey

Based on data compiled by the American Bakers Association.



UCBCo

BAKING equipment

Class 3A: Companies with 51-150 vehicles
(28 baking companies)
2,644 vehicles in total

Vehicle	Total	Company owned	Full-service Lease	Lessor take-back
Cars	296	234	1	61
Trucks	1,610	1,468	142	—
Tractors	320	213	67	40
Trailers	418	381	20	17

Vehicle	Engine type			
	Gasoline	Diesel	Propane	CNG
Walk-in/route van[1]	789	68	57	—
Walk-in/route van[2]	396	74	136	—
Walk-in/route van[3]	17	4	—	—
Medium truck[4]	18	6	—	—
Medium truck[5]	17	24	—	—
Heavy truck[6]	—	4	—	—
Medium tractor[7]	18	186	5	—
Heavy tractor[8]	—	111	—	—

Vehicles converted	Diesel repowered	Propane converted	CNG converted
Walk-in/route van[1]	32	57	—
Walk-in/route van[2]	21	131	—
Walk-in/route van[3]	4	—	—
Medium truck[4]	—	—	—
Medium truck[5]	—	—	—
Heavy truck[6]	—	—	—
Medium tractor[7]	—	—	—
Heavy tractor[8]	—	—	—

Vehicle age	<5 years	5-10 years	10-15 years	>15 years
Walk-in/route van[1]	311	267	244	92
Walk-in/route van[2]	151	231	172	52
Walk-in/route van[3]	10	—	—	11
Medium truck[4]	6	15	2	1
Medium truck[5]	6	6	17	12
Heavy truck[6]	4	—	—	—
Medium tractor[7]	93	78	34	4
Heavy tractor[8]	80	19	12	—
Single-axle trailer	81	49	28	7
Tandem-axle trailer	62	53	32	2
Reefer	49	46	—	—
Dry bulk & other	—	5	2	2

Vehicle	Average miles driven	Number stops	Top speed mph	Local : Highway
Walk-in/route van[1]	19,857	30	53	65 : 35
Walk-in/route van[2]	24,450	28	55	60 : 40
Walk-in/route van[3]	35,667	27	48	58 : 42
Medium truck[4]	12,749	7	56	71 : 29
Medium truck[5]	24,660	21	65	55 : 45
Heavy truck[6]	61,333	13	60	55 : 45
Medium tractor[7]	64,114	7	56	6 : 94
Heavy tractor[8]	81,510	4	55	10 : 90

Vehicle	Chassis life weighted avg. years	Body life weighted avg. years
Walk-in/route van[1]	11.5	16.0
Walk-in/route van[2]	17.1	17.1
Walk-in/route van[3]	16.6	15.5
Medium truck[4]	8.6	
Medium truck[5]	11.6	
Heavy truck[6]	6.0	
Medium tractor[7]	9.7	
Heavy tractor[8]	8.2	
Single-axle trailer	11.3	
Tandem-axle trailer	14.9	
Reefer	6.8	
Dry bulk & other	11.7	

References: [1]<10,000 lb GVW. [2]10,001-15,000 lb GVW. [3]15,001-19,500 lb GVW. [4]19,501-26,000 lb GVW. [5]26,001-33,000 lb GVW. [6]>30,000 lb GVW. [7]<50,000 lb GCW. [8]>50,000 lb GCW.

Class 3B: Companies with <50 vehicles
(32 baking companies)
898 vehicles in total

Vehicle	Total	Company owned	Full-service Lease	Lessor take-back
Cars	165	118	21	26
Trucks	393	342	40	11
Tractors	136	57	78	1
Trailers	204	131	72	1

Vehicle	Engine type			
	Gasoline	Diesel	Propane	CNG
Walk-in/route van[1]	283	8	14	—
Walk-in/route van[2]	49	1	5	—
Walk-in/route van[3]	3	—	—	—
Medium truck[4]	3	7	—	—
Medium truck[5]	—	20	—	—
Heavy truck[6]	—	—	—	—
Medium tractor[7]	22	61	—	—
Heavy tractor[8]	3	50	—	—

Vehicles converted	Diesel repowered	Propane converted	CNG converted
Walk-in/route van[1]	—	22	—
Walk-in/route van[2]	1	5	—
Walk-in/route van[3]	—	—	—
Medium truck[4]	—	—	—
Medium truck[5]	1	—	—
Heavy truck[6]	1	—	—
Medium tractor[7]	3	—	—
Heavy tractor[8]	—	—	—

Vehicle	Average miles driven	Number stops	Top speed mph	Local : Highway
Walk-in/route van[1]	21,854	29	55	56 : 44
Walk-in/route van2	18,249	24	55	29 : 71
Walk-in/route van[3]	10,417	22	55	20 : 80
Medium truck[4]	39,245	7	56	30 : 70
Medium truck[5]	59,333	2	57	5 : 95
Heavy truck[6]	—	—	—	—
Medium tractor[7]	53,789	9	56	26 : 74
Heavy tractor[8]	78,750	6	61	20 : 80

Vehicle age	<5 years	5-10 years	10-15 years	>15 years
Walk-in/route van[1]	61	141	62	41
Walk-in/route van[2]	17	36	2	—
Walk-in/route van[3]	3	—	—	—
Medium truck[4]	10	—	—	—
Medium truck[5]	9	7	3	1
Heavy truck[6]	—	—	—	—
Medium tractor[7]	56	16	10	1
Heavy tractor[8]	47	4	2	—
Single-axle trailer	1	14	7	1
Tandem-axle trailer	34	96	11	—
Reefer	25	2	10	—
Dry bulk	—	1	2	—

Vehicle	Chassis life weighted avg. years	Body life weighted avg. years
Walk-in/route van[1]	14.9	14.0
Walk-in/route van[2]	10.4	14.2
Walk-in/route van[3]	—	11.0
Medium truck[4]	8.5	
Medium truck[5]	6.7	
Heavy truck[6]	—	
Medium tractor[7]	11.4	
Heavy tractor[8]	4.9	
Single-axle trailer	14.2	
Tandem-axle trailer	12.2	
Reefer	7.7	
Dry bulk	19.0	

References: [1]<10,000 lb GVW. [2]10,001-15,000 lb GVW. [3]15,001-19,500 lb GVW. [4]19,501-26,000 lb GVW. [5]26,001-33,000 lb GVW. [6]>30,000 lb GVW. [7]<50,000 lb GCW. [8]>50,000 lb GCW.

Bakery fleets altering fuel choices and truck sizes as modernization proceeds

Diesel emerges as the baker's alternate fuel, while radial tires increase in use. New trucks are longer and heavier.

What's happened in the past year among bakery fleets? According to the 1984 Bakery Fleet Transportation Survey just completed by the American Bakers Association, when the baker thinks alternate fuels, he thinks diesel. Another well-defined trend is that new walk-in/route vans will be somewhat longer and heavier than those making up the current fleet. There's data here suggesting that the average age of route trucks is decreasing, due to fleet modernization efforts. And deregulation of trucking is beginning to offer bakers, the operators of some of the largest private fleets in the country, interesting new profit opportunities.

The 1984 Bakery Fleet Transportation Survey, prepared by the Fleet Executives Committee of the American Bakers Association, is again exclusively presented by *Baking Equipment* and Union City Body Co. (The first ABA fleet census was published in Dec. 13, 1983, *Baking Equipment*, pp. BE-29 to BE-40.)

Although fewer baking companies (51, as opposed to 94) participated in the 1984 survey, the number of trucks covered is only 9% lower: 36,198 this year; 39,741 last year. The proportional distribution among types of vehicles, as reported in **Table 1,** is virtually identical. Data-gathering methodology, supervised by Ira Dorfman, ABA staff liason with the Fleet Executives Committee, involved not only an extensive census form—40 pages in length—but also encompassed telephone survey work to make sure major bakers were contacted and included here.

This year, 12 fleets of 500 or more vehicles (Fleet A) rather than 1983's 15 are reported. Among companies in Fleet B size (151 to 499 vehicles), 12 companies participated in 1984, while 19 did in 1983. Fleet C, those operating up to 150 vehicles, accounted for 27 companies this year, 60 last year.

Last year some bakers of considerable size reported fleets that survey managers found much smaller than expected. The reason, they speculated, must involve use of independent distributors. And, indeed, this proved true. Asking about such "outside" fleets, the 1984 census revealed 2,707 route trucks owned and operated by independent distributors. This accounts for 8% of all walk-in/route vans and 6% of the total baking fleet.

Number of	1984	1983
Vehicles (total)	44,359	48,169
Trucks	36,198	39,741
Bakeries (total)	51	94
Fleet A bakers (500+ vehicles)	12	15
Fleet B bakers (151-499 vehicles)	12	19
Fleet C bakers (50-151 vehicles)	27	60

Altogether, the 1984 Bakery Fleet Transportation Survey sampled roughly 30% of the industry's fleet, estimated at some 140,000 vehicles, according to the ABA. In an effort to get the maximum number of vehicles into the census, survey managers made special efforts to include the major bakers, especially those operating 500 or more vehicles. Indeed, this study includes 12 such companies.

Longer, heavier walk-ins. Among walk-in/route vans, three trends are very evident in just the one year since this census was last taken:

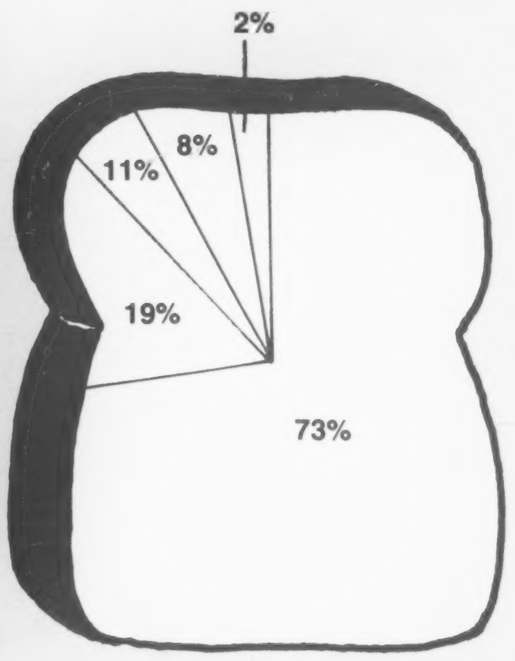
- Delivery vehicles are becoming longer.
- And heavier.
- And increasingly powered by diesel fuel.

Asked about the length of future walk-in/route vans to be purchased, half of the companies answering—20 of 41—said that they foresaw longer lengths. Altogether, they plan to order slightly more than 1,000 new route truck chassis and nearly 1,000 new route truck bodies during the next 12 months.

Tables 2 and 3 show how bakers are making different choices for their new vehicles, compared to what comprises

Table 1: **Number of Vehicles all baking companies participating**

	1984 Units	1983 Units
Walk-in/route van		
10,000 lb GVW or less	23,444	27,313
10,001-15,000 lb GVW	8,466	7,532
15,001-19,500 lb GVW	255	281
Subtotal route trucks	**32,165**	**35,126**
Medium trucks (straight trucks)		
19,501-26,000 lb GVW	475	496
26,001-33,000 lb GVW	208	445
over 33,000 lb GVW	20	
Subtotal straight trucks	**703**	**941**
Tractors		
Medium, 2-axle 50,000 lb GCW or less	2,694	2,989
Heavy, 3-axle Over 50,000 lb GCW	636	685
Subtotal tractors	**3,330**	**3,674**
Subtotal trucks	**36,198**	**39,741**
Cars	**3,359**	**3,415**
Trailers	**4,802**	**5,013**
Total vehicles (total fleet)	**44,359**	**48,169**
Number of companies	**51**	**94**



73% Walk-in/route vans
2% Medium trucks (straight trucks)
19% Tractors

8% Cars
11% Trailers

Key: percentages in parentheses indicate subcategory shares.

Table 2: **Changing van sizes of walk-in/route vans**

	Current fleet	New orders	
Under 12 ft	7%	16%	79% of current walk-in/route vans are 14 ft or under, yet 22% of new orders are this size.
12 ft	10%	—	
13-14 ft	62%	6%	
(14 ft and under)	(79%)	(22%)	
15-16 ft	19%	52%	21% of current walk-in/route vans are 15 ft or over, yet 77% of new orders are this size.
>16 ft	2%	25%	
(15 ft and over)	(21%)	(77%)	

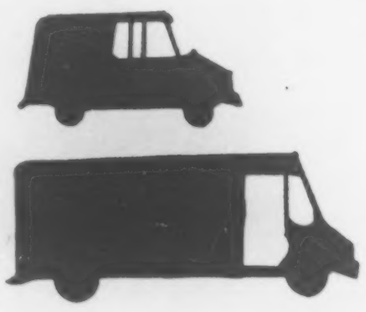
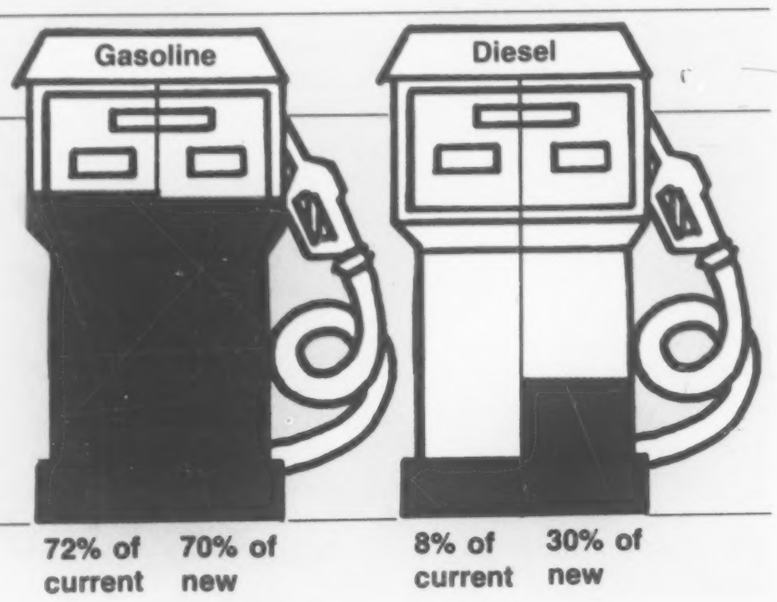


Table 3: **Changing fuel choices of walk-in/route vans**

	Current fleet	New orders
Under 10,000 lb GVW vans	73%	55%
Fueled by gasoline	72%	70%
by diesel	8%	30%
by propane	20%	—
by CNG and electric	<1%	—
10,000-15,000 lb GVW vans	26%	45%
Fueled by gasoline	59%	48%
by diesel	41%	52%



their current fleet. Besides the changes in length and fuel, these new walk-in/route vans are increasingly heavier than current units:

Walk-in/route van weight	Current fleet	New orders
Under 10,000 lb GVW	73%	55%
10,000 to 15,000 lb GVW	26%	45%

Of the 15 new straight trucks planned to be purchased during the next 12 months, only two will be gasoline powered and none will use propane or compressed natural gas as their fuels. All 203 of the new tractor purchases will be diesel powered.

Diesel: the alternate fuel. Gasoline has been the baker's fuel of choice ever since powered vehicles replaced the horse-drawn delivery wagon. The industry weathered one crisis in gasoline availability during the Arab Oil Embargo in the late 1970s. Today it faces another.

The industry's preference for leaded gasoline as a delivery fuel poses a future problem in availability, especially for urban baking operations. The air pollution effects of leaded gasoline has been linked by health professionals with lead poisoning and brain damage. In September 1984, Chicago banned leaded gasoline. This action affects only retail (consumer) sales of leaded gasoline and has not yet been echoed by other municipalities. In a more significant development, the Environmental Protection Agency presently has pending a proposal to phase out leaded gasoline on a national basis. All this sends signals of overall diminishing availability—and increased price—for leaded gasoline, the primary fuel for the baking industry's delivery fleet of walk-in/route vans.

The price difference currently favoring leaded gasoline is compounded by the better performance characteristics of the leaded fuel. While some gasoline engines can burn both leaded and unleaded gasoline, some gasoline engines in the bakery fleet can only burn leaded fuel. The EPA proposal has made provisions for a "low-lead" fuel; however, in testimony before the agency in August, ABA predicted that should bakers be forced to use even this low-lead fuel, it would cause loss of maximum engine performance and shorter engine life.

In recent years, automobile engines have been altered to decrease the release of pollutants into the atmosphere. The addition of catalytic converters to cars requires these vehicles to burn only unleaded fuel.

For 1985, catalytic converters are being added to gasoline engines on walk-in/route van chassis. Not only does this add to the cost of these chassis, the required use of higher-priced unleaded gasoline suddenly puts diesel on a cost-effective footing for delivery fleets. The price difference, when compounded by the mileage difference between gasoline at 8 to 9 mpg diesel at 14 to 19 mpg, thus substantially shortens the payback period on the higher-priced diesel walk-in/route van chassis.

No wonder the proportion of diesel-powered vehicles in the baker's fleet is in for a change.

Roughly 13% of the baking fleet, 4,895 vehicles **(Table 4),** is powered by fuels other than gasoline or diesel, the ones traditionally termed alternate fuels. This percentage represents no change in share from last year's figures.

All the reasons that favor diesel have combined to make it the baker's alternative fuel choice at the expense of propane, compressed natural gas (CNG) and electricity. The last year has seen no real change in the number of propane and CNG-powered vehicles in the baker's fleet. Additionally, no new programs for implementing these fuels have been started by bakers involved in the ABA census ... nor are any being considered for future involvement.

Table 4: **Fuels used**
number of vehicles powered with

	1984		1983	
Gasoline	21,125	(62%)	25,076	(63%)
Diesel	7,868	(23%)	9,465	(24%)
Propane	4,782	(14%)	5,093	(13%)
CNG	103	(<1%)	97	(<1%)
Electric	10	(<1%)	10	(<1%)

Percentages based on sample reporting vehicle fuel—1984: 33,898; 1983: 39,741. 1984 figures do not include the 2300 walk-in/route vans operated by distributors.

Trends in tires. There seems to be a greater acceptance of radial tires for route trucks, according to the 1984 Bakery Fleet Transportation Survey. Historically, bias ply tires have been used by this type of vehicle; however, radial tires are making real in-roads among bakery fleets. A big difference is seen in new tire purchases reported between last year and this ... and between the purchase practices of different size fleets, as reported by **Table 5.**

Number of	1984	1983
Bias ply tires	31,296	41,581
Radial tires	9,364	3,282
Total	40,660	44,863
Proportion (%)		
Bias ply : **Radial**	77:**23**	91:**9**

Chassis re-life & engine repower. Because aluminum walk-in/route van bodies generally outlive their original chassis, the practice of re-life and repower of fleet vehicles is fairly common among baking companies. To study this, the ABA Fleet Executives Committee added a number of questions about re-life and repower to the 1984 Bakery Fleet Transportation Survey form. **Table 6** details current thinking among baking fleet executives about re-building and repowering their delivery vehicles.

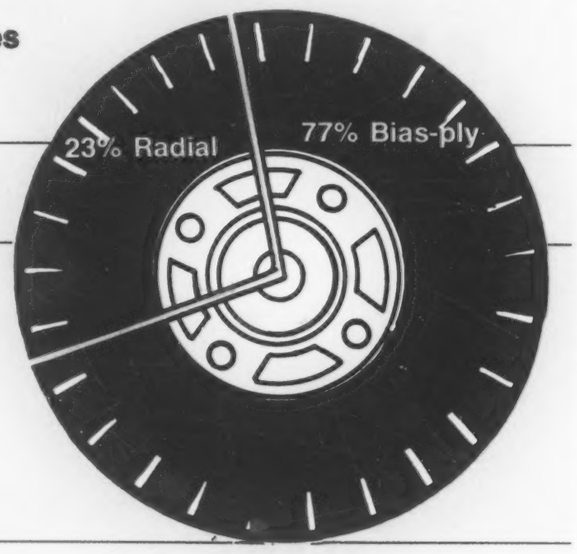
Chassis re-life programs tend to be in-house activities, especially for the larger fleets. Of the 11 companies in the 1984 survey with chassis re-life programs, eight are in-house, and of those eight, five exist among fleets with 500 or more vehicles. A total of 153 chassis have been re-lifed during the past 12 months by this sample of bakers, who noted they have done this for 1,637 chassis altogether during the duration of their chassis re-life programs.

One way to add to fleet capacity is to lengthen delivery vehicles. The fact that well over 1,600 vehicles have been stretched—105 this year alone—testifies to the success of this idea. Fleets of all sizes are involved in stretching programs. Asked about the starting and finishing lengths of such trucks, fleet managers gave a range of 12 to 14 ft as the original length of the truck, with 18 to 19½ ft as the extended length.

Diesel repower of existing vehicles is done by a few fleets **(Table 6).** The majority of these cover walk-in/route vans, with nine companies currently operating diesel repower programs and five indicating that they anticipated development of route truck diesel repower programs in the future. Only one company reported that it repowers medium/heavy duty trucks (straight trucks), while five companies have diesel repower programs for tractors.

Table 5: **Tire purchases**
Bias ply v. radial

Vehicles in fleet	Total fleet	Fleet A 500+	Fleet B 499-151	Fleet C up to 150
Bias ply tires	31,296	27,862	2,998	436
Radial tires	9,364	7,419	1,206	739
Total	40,660			
(Share of total)		(87%)	(10%)	(3%)
Proportion (%)				
Bias ply : **Radial**	77:**23**	79:**21**	71:**29**	37:**63**



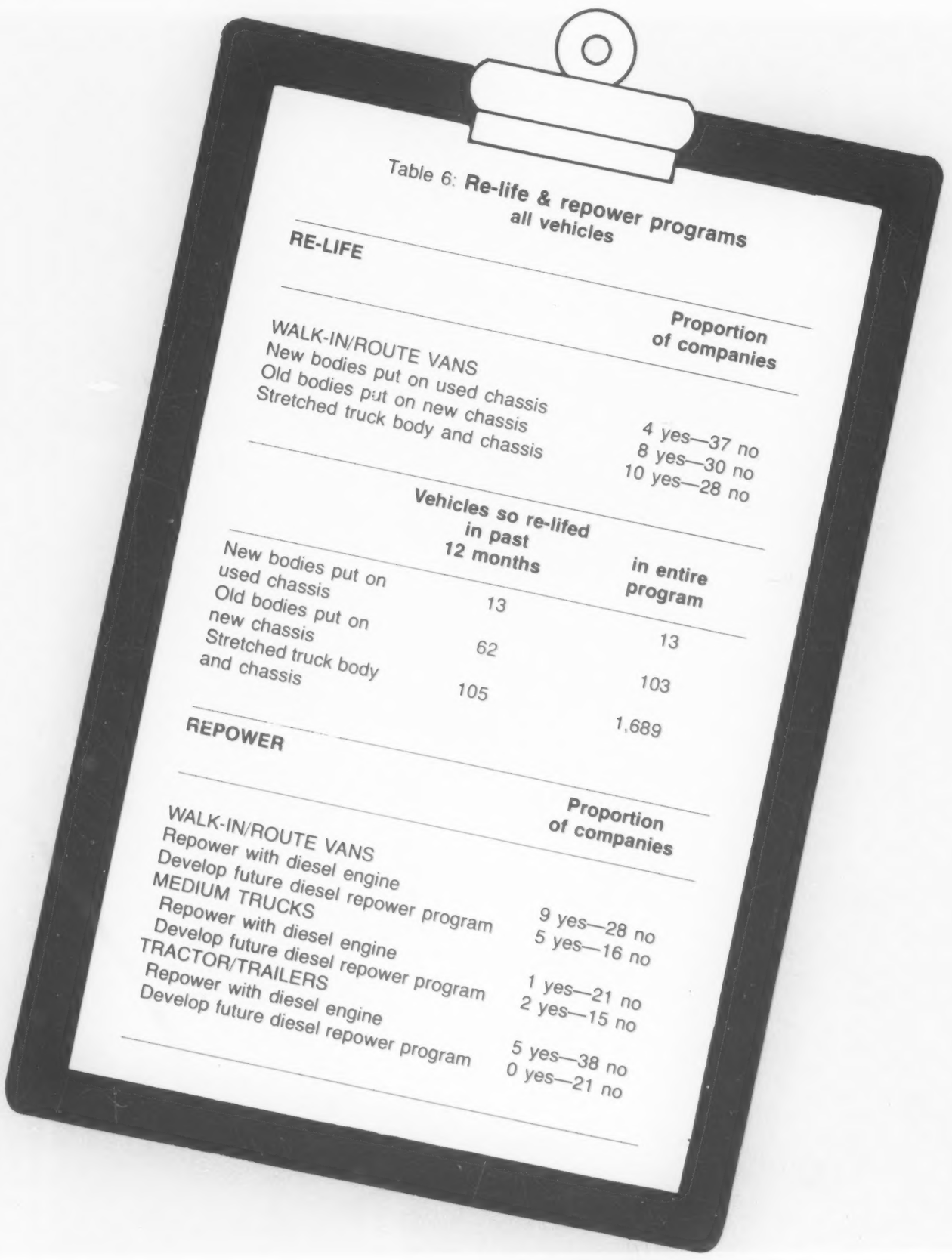


Table 6: **Re-life & repower programs**
all vehicles

RE-LIFE	Proportion of companies
WALK-IN/ROUTE VANS	
New bodies put on used chassis	4 yes—37 no
Old bodies put on new chassis	8 yes—30 no
Stretched truck body and chassis	10 yes—28 no

	Vehicles so re-lifed in past 12 months	in entire program
New bodies put on used chassis	13	13
Old bodies put on new chassis	62	103
Stretched truck body and chassis	105	1,689

REPOWER	Proportion of companies
WALK-IN/ROUTE VANS	
Repower with diesel engine	9 yes—28 no
Develop future diesel repower program	5 yes—16 no
MEDIUM TRUCKS	
Repower with diesel engine	1 yes—21 no
Develop future diesel repower program	2 yes—15 no
TRACTOR/TRAILERS	
Repower with diesel engine	5 yes—38 no
Develop future diesel repower program	0 yes—21 no

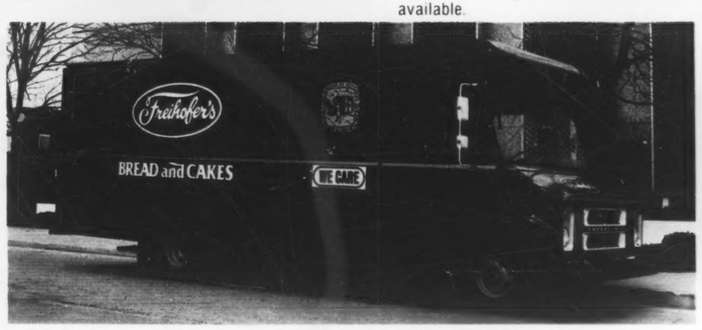
P30 Value Van 14'6" Aluminum.

Step-Van/Value Van Steel. Aluminum bodies available.

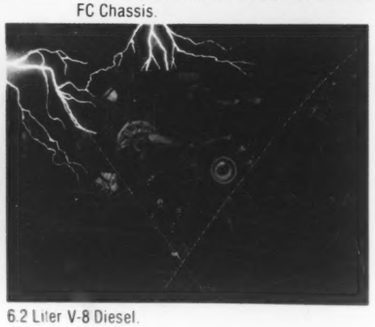
Hi-Cube Van/Magnavan Steel. Aluminum bodies available.

Series X-950 Aluminum bodies for GM Medium-Duty FC Chassis.

Unmatched dealer body.



Chevrolet Step-Van 18' Aluminum with more than 25 Special Equipment modifications.



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Union City Body Company entered the delivery truck market in 1950, offering two steel bodies. In 1957 we began building delivery truck bodies for General Motors. We now build the widest product range in the industry, with 69 different sizes available in steel or aluminum body construction. And we have been the largest volume producer for the last twelve years.* No one can offer you better experience.

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Our products are sold only through Chevrolet or GMC Truck & Coach dealerships. No one can match the number and quality of that combined dealer body. *And no one has sold more of these specialized vehicles.*

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26 YEARS OF CONTINUALLY UPGRADING THE PRODUCT

The Chevrolet Step-Van and GMC Value Van are entering the twenty-seventh year of service on the streets of America and they just keep getting tougher. As the result of extensive and lengthy testing, the steel-body models received a major redesign, with improvements including all exterior skin panels and many other components now being fabricated of iron-zinc alloy steel. Also, in the continuing process of upgrading the product, the aluminum bodies feature an aluminum alloy that is new to the delivery truck field. *An alloy that provides impressive performance in every property critical to its use in a truck body.* Built to last longer and work harder.

SINGLE WARRANTY ON THE COMPLETE VEHICLE

When you buy a GM delivery van model there is a single limited warranty covering both body and chassis. Even if it's a diesel model. One warranty from one manufacturer covering the complete vehicle. See dealers for details.

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Although you get all the benefits of buying the product of a major manufacturer, you can also order the fleet vehicles you need, equipped to do your job, with all the equipment factory-installed to save time, money and trouble.

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The Union City Field Sales Representative based in your area is the key to taking advantage of all the benefits of the product value, range and versatility available with the GM delivery models. He is a forward control fleet specialist and he is there for your benefit. Contact him to discuss your fleet operating requirements. He is better than having a friend at the factory, and he is as close as your telephone.

**Motor Vehicle Manufacturers Association of the United States, Inc.: December 31, 1971 through December 31, 1983, Report FS-20.*

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Deregulation: options & choices. Deregulation of trucking has produced some interesting opportunities for bakers, especially those who can exploit backhaul and inter-company transfer opportunities. Although the number of companies developing these trucking subsidiaries is small, as **Table 7** suggests, they represent a starting trend.

It's the smaller fleets that are establishing or considering creation of trucking subsidiaries: companies with 150 or fewer vehicles account for five of the eight with such subsidiaries, and two of the three considering such options.

Single-source leasing, a new provision under trucking deregulation, is a way of earning money on trucks that would normally stand idle or, alternately, to cover a few days of peak period without having to invest in additional trucks. Although only a few bakers are trying this fleet option, eight are involved with single-source leasing of tractors, while another six are looking at it. Single-source leasing of medium/heavy-duty straight trucks involve five companies, with two more considering the option.

Modernization proceeding. Even in the one year between this study and the last, there are some indications that vehicle modernization is accelerating. **Table 9** shows the differing life expectancies that companies expect for their fleet vehicles. **Table 10** shows a small percentage change in vehicle age, across the entire fleet.

Statistics for miles driven annually per vehicle and the number of stops show similar ranges this year as they did in the first ABA fleet census. In general, the more cargo capacity a truck has, the more miles it covers in a year. On the other hand, the most stops per day are made by the smallest vehicles. Mr. Dorfman laid these seemingly contradictory results before the ABA Fleet Executives Committee at a meeting held just prior to the release of the 1984 study results. The consensus was that bakers tend to use smaller vehicles to service smaller accounts, while delivering larger accounts via larger vehicles.

Table 7: **De-regulation choices affecting fleet options for bakers**

OPTION	Proportion of companies
GENERAL	
Establishing a trucking subsidiary	8 yes—42 no
Considering establishing a trucking subsidiary	3 yes—38 no
WALK-IN/ROUTE TRUCKS	
Operating any routes by independent distributor	12 yes—28 no
Number of trucks operated:	
Total fleet	2,707
Fleet A	2,518
Fleet B	131
Fleet C	58
MEDIUM TRUCKS	
Using contract/common carriage	2 yes—28 no
Carrying exempt merchandise (such as U.S. mail)	0 yes—28 no
Considering carrying exempt merchandise	4 yes—19 no
Single-source leasing	5 yes—23 no
Considering single-source leasing	2 yes—17 no
TRACTORS/TRAILERS	
Using contract/common carriage	14 yes—32 no
Carrying exempt merchandise (such as U.S. mail)	3 yes—41 no
Considering carrying exempt merchandise	6 yes—31 no
Single-source leasing	8 yes—34 no
Considering single-source leasing	6 yes—23 no

Miles covered	1984	1983
Walk-in/route vans		
Under 10,000 lb GVW	17,098	19,645
10,000 to 15,000 lb GVW	16,953	18,564
15,001 to 19,500 lb GVW	21,837	15,582
Medium trucks (transports)		
19,501 to 26,000 lb GVW	24,374	22,900
26,001 to 33,000 lb GVW	6,514	32,460
Heavy trucks		
Over 33,000 lb GVW	99,400	111,394
Tractors		
2-axle	71,352	78,198
3-axle	92,017	79,845

Stops per day	1984	1983
Walk-in/route vans		
Under 10,000 lb GVW	33	31
10,000 to 15,000 lb GVW	35	26
15,001 to 19,500 lb GVW	19	28
Medium trucks (transports)		
19,501 to 26,000 lb GVW	12	11
26,001 to 33,000 lb GVW	6	15
Heavy trucks		
Over 33,000 lb GVW	6	10
Tractors		
2-axle	7	7
3-axle	5	4

Highway driving	1984	1983
Walk-in/route vans		
Under 10,000 lb GVW	20%	40%
10,000 to 15,000 lb GVW	20%	44%
15,001 to 19,500 lb GVW	43%	62%
Medium trucks (transports)		
19,501 to 26,000 lb GVW	31%	57%
26,001 to 33,000 lb GVW	60%	38%
Heavy trucks		
Over 33,000 lb GVW	93%	71%
Tractors		
2-axle	78%	85%
3-axle	82%	83%

Overall in 1984, top speeds for fleet vehicles were somewhat lower than the previous year. In 1983, every vehicle category was rated in the narrow range of 54 to 58 mph (weighted average). The only exception were the heaviest of the walk-in/route vans, those weighing 15,001 to 19,500

Table 8: **Trailers in bakers' fleets**

Type	Number	(Share)
Single-axle	768	(16%)
Tandem-axle	3,667	(76%)
Refrigerated	315	(7%)
Dry bulk	52	(1%)
Total	**4,802**	

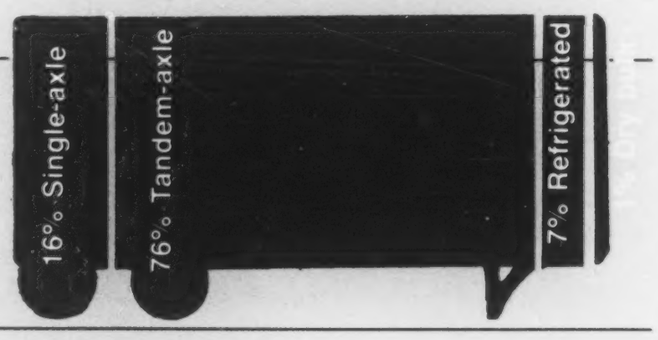


Table 9: **Average vehicle life expectancy years (weighted averages)**

	Under 10	10-15 yr	16-19 yr	20 or more
Walk-in/route van				
chassis	10%	43%	39%	8%
bodies	—	7%	62%	32%
	Under 5	**5-10 yr**	**11-15 yr**	**15 or more**
Medium trucks	3%	42%	29%	27%
Trailers	31%	40%	23%	6%
	Under 5	**5-8 yr**	**9-12 yr**	**12 or more**
Tractors	7%	7%	65%	22%

GVW, which averaged 44 mph in top speed. In contrast, the range of speeds this year was:

- Walk-in/route vans: 47 to 54 mph
- Medium/heavy duty straight trucks: 46 to 56 mph
- Tractors: 55 to 57 mph.

The analysis of where these vehicles are driven show very different results this year than last. One interpretation is that the heavier walk-in/route vans, transports and tractors are being increasingly committed to large-order deliveries. The wide variance in these weighted averages, however, clouds such speculation.

Taxes & tractor weights. Besides creating a portrait of the baking industry's fleet, the 1984 Bakery Fleet Transportation Survey also gives the association a statistical tool to help build lobbying positions on fleet issues. For example, a key survey question, new this year, asked about the actual weights at which tractors normally operate.

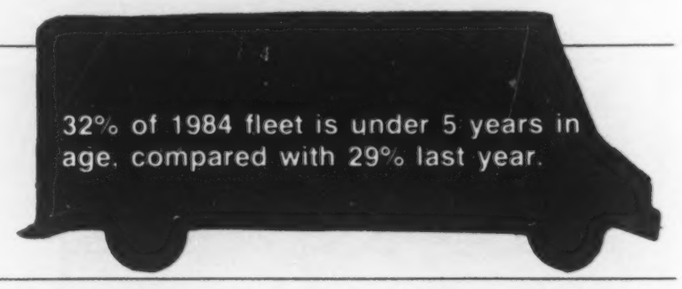
Specifically, respondents were asked what was the approximate maximum gross weight at which they operated their tractors. The question asked for actual vehicle weight, including fully loaded trailor, rather than registry weight for tax purposes:

Gross vehicle weight (lb)	2-axle Tractors	3-axle Tractors
Total fleet	52,407	72,171
Fleet A (500+ vehicles)	52,667	70,214
Fleet B (151-499 vehicles)	52,774	75,278
Fleet C (up to 150 vehicles)	49,341	75,309

Proposed changes in the way trucks are taxed could prove highly inequitable to bakers. Tractors with capacity ratings of 55,000 lb gross combination weight (GCW) and above would be federally taxed—required to pay a $210/truck "user's fee"—while those below that threshold would not be taxed. While a basic assumption by the Internal Revenue Service is that the weight of 2-axle tractors with trailers rises above the 55,000-lb-GCW threshold, the 1984 ABA fleet study reports that customary usage of 2-axle tractors by bakers is in the range of 52,000 lb GCW. Mr. Dorfman said that the association will be using this fact in lobbying the IRS for exemptions from these truck taxes for bakers. ■

Table 10: **Current vehicle age**

	1984		1983	
Under 5 years	10,985	(32%)	12,860	(29%)
5-10 years	11,046	(32%)	14,563	(33%)
10-15 years	8,609	(25%)	11,798	(26%)
Over 15 years	3,665	(11%)	5,489	(12%)



Percentages based on sample reporting vehicle age—1984: 34,295; 1983: 44,710. (Includes trucks and trailers, but does not include automobiles.)

INTERNATIONAL BAKING INDUSTRY EXPOSITION 1985

NOVEMBER 8-12
LAS VEGAS, NEVADA

TRANSPO at EXPO

Transportation will get featured billing next fall at the largest baking exposition in the western hemisphere. When the International Baking Industry Exposition opens in Las Vegas on November 8, 1985, it will devote an entire hall to fleet and transportation-oriented exhibitors. Additionally, "Transpo '85," an educational seminar covering current topics in fleet management is being planned by the Fleet Executives Committee of the American Bakers Association.

Baking Expo '85, sponsored jointly by the Bakery Equipment Manufacturers Association and ABA, takes place once every four years. In all, the show will take up more than 350,000 net sq ft—the equivalent of 4¼ football fields of space. World innovations in baking will be on display, as more than 200 exhibitors exhibit the latest equipment, ingredient, material handling ... and transportation ideas.

"Transpo '85" will take place on the mornings of November 8 through 10, with sessions scheduled prior to the daily morning opening of Expo exhibits. This will allow "Transpo '85" attendees and speakers to take full advantage of both the multiple-session seminar programs and the show hall exhibits.

Expo pre-registration and hotel information has just been released by the show management. Contact Janie C. Kellam, Secretary-Treasurer, IBIE, 1111 14th St. N.W., Suite 300, Washington, D.C. 20005; telephone: 202/296-5800; telex: 25-4073 SBA. ■

Vehicle type and operating statistics for 1984 Bakery Fleet Transportation Survey

Number of companies	51	12	12	27
VEHICLES operated				
Walk-in/route vans	32,165	29,252	2,081	832
Medium trucks (straight trucks)	703	327	340	36
Tractors	3,330	2,708	281	341
Automobiles	3,359	2,734	325	300
Trailers	4,802	3,620	712	470
Vehicles (without trailers)	39,557	35,021	3,027	1,509
Vehicles (with trailers)	44,359	38,641	3,739	1,979
AUTOMOBILES operated				
Total	3,359	2,734	325	300
Company-owned	2,410 (72%)	1,888 (69%)	249 (76%)	273 (91%)
Leased	949 (28%)	846 (31%)	76 (24%)	27 (9%)
FUEL PURCHASES for calendar 1983				
Gal of gasoline	35,448,196	29,089,250	4,426,842	1,932,104
Gal of diesel fuel	50,071,550	39,659,011	3,980,979	6,431,550
Gal of propane	15,061,583	14,308,336	555,781	187,466
Gal of CNG	155,000*			

*One company only

Total	32,165	29,252	2,081	832
Under 10,000 lb GVW				
Total	23,444 (73%)	21,710	1,361	373
Company-owned	17,926	16,272	1,291	363
Leased	5,518	5,438	70	10
10,000-15,000 lb GVW				
Total	8,466 (26%)	7,492	522	452
Company-owned	5,469	4,560	552	378
Leased	2,997	2,932	—	65
15,001-19,500 lb GVW				
Total	255 (1%)	50	198	7
Company-owned	255	50	198	7
Leased	—	—	—	—
Number of gasoline engines				
<10,000 lb GVW	16,904	15,370	1,225	309
10,000-15,000 lb GVW	3,611	2,858	394	359
15-19,500 lb GVW	153	—	146	7
Total	20,688 (69%)	18,228	1,756	657
Number of diesel engines				
<10,000 lb GVW	1,820	1,746	30	44
10,000-15,000 lb GVW	2,498	2,334	119	45
15,001-19,500 lb GVW	61	—	11	0
Total	4,379 (15%)	4,080	160	89

Number of propane engines				
TOTAL				
<10,000 lb GVW	4,607	4,481	106	20
10,000-15,000 lb GVW	57	—	9	48
15,001-19,500 lb GVW	41	—	41	—
Total	4,705 (16%)	4,481	156	68
CONVERSION UNITS within total propane engines above				
<10,000 lb GVW	4,564	4,481	63	20
10,000-15,000 lb GVW	57	—	9	48
15,001-19,500 lb GVW	41	—	41	—
Number of CNG engines				
<10,000 lb GVW	103	103	—	—
10,000-15,000 lb GVW	—	—	—	—
15,001-19,500 lb GVW	—	—	—	—
Total	103 (<1%)	103	—	—
Electrically-powered engines				
<10,000 lb GVW	10	10	—	—
10,000-15,000 lb GVW	—	—	—	—
15,001-19,500 lb GVW	—	—	—	—
Total	10 (<1%)	10	—	—
Walk-in/route van body length				
<12 feet				
<10,000 lb GVW	2,022	1,861	107	54
10,000-15,000 lb GVW	102	102	—	—
15,001-19,500 lb GVW	—	—	—	—
Total	2,124 (7%)	1,963	107	54
12 feet				
<10,000 lb GVW	2,935	2,763	164	35
10,000-15,000 lb GVW	51	8	10	33
15,001-19,500 lb GVW	25	—	25	—
Total	3,011 (10%)	2,771	199	68
13-14 feet				
<10,000 lb GVW	13,972	13,231	655	86
10,000-15,000 lb GVW	4,480	4,222	22	236
15,001-19,500 lb GVW	—	—	—	—
Total	18,452 (62%)	17,453	677	332
15-16 feet				
<10,000 lb GVW	4,475	3,879	420	176
10,000-15,000 lb GVW	1,203	566	466	171
15,001-19,500 lb GVW	7	—	—	7
Total	5,685 (19%)	4,445	886	354
Over 16 feet				
<10,000 lb GVW	40	3	15	22
10,000-15,000 lb GVW	330	294	24	12
15,001-19,500 lb GVW	173	—	173	—
Total	543 (2%)	297	212	34
New route truck body purchases planned in next 12 months				
<12 feet	153 (16%)	153	—	—
12 feet	—	—	—	—
13-14 feet	58 (6%)	38	20	—
15-16 feet	488 (52%)	420	32	36
>16 feet	238 (25%)	180	44	14
Total	937	791	96	50

Miles per vehicle per year (weighted average)				
<10,000 lb GVW	17,098	17,430	12,421	14,758
10,000-15,000 lb GVW	16,953	17,033	16,580	15,065
15,001-19,500 lb GVW	21,837	25,000	10,628	48,833
Stops per day per vehicle (weighted average)				
<10,000 lb GVW	32.5	32.9	21.1	30.7
10,000-15,000 lb GVW	35.0	36.4	26.3	30.9
15,001-19,500 lb GVW	19.4	—	19.5	14.7
Average top speed (weighted average)				
<10,000 lb GVW	47	47	47	47
10,000-15,000 lb GVW	48	47	59	55
15,001-19,500 lb GVW	54	55	38	51
Percentage of driving done on interstate or other major highways (weighted average)				
<10,000 lb GVW	20	19	20	20
10,000-15,000 lb GVW	20	17	49	47
15,001-19,500 lb GVW	43	—	47	53
Tire purchases				
Bias-ply tires purchased for walk-in/route vans during the past 12 months	31,296 (77%)	27,862	2,998	436
Radial tires purchased for walk-in/route vans during the past 12 months	9,364 (23%)	7,419	1,206	739
Life expectancy for walk-in/van chassis (weighted average)				
<10 years	9.6%	10.3%	—	8.2%
10-15 years	43.2%	44.2%	29.2%	42.8%
16-19 years	39.4%	40.2%	37.6%	16.6%
20 years or more	7.7%	5.3%	30.8%	32.5%
Life expectancy for truck bodies (weighted average)				
<10 years	—	—	—	—
10-15 years	6.9%	4.7%	31.2%	18.6%
16-19 years	61.5%	66.1%	11.5%	36.5%
20 years or more	31.5%	29.2%	57.3%	44.8%
New chassis purchases planned in next 12 months				
<10,000 lb GVW	559 (55%)	488	49	22
10,000-15,000 lb GVW	451 (45%)	369	47	44
15,001-19,500 lb GVW	—	—	—	—
Engines powering these new chassis				
GASOLINE				
<10,000 lb GVW	391	358	19	14
10,000-15,000 lb GVW	218	150	32	36
15,001-19,500 lb GVW	—	—	—	—
DIESEL				
<10,000 lb GVW	168	130	32	8
10,000-15,000 lb GVW	233	210	15	8
15,001-19,500 lb GVW	—	—	—	—
PROPANE	none			
CNG	none			

Total	703	475	340	36
19,501-26,000 lb GVW				
Total	475	302	162	11
Company-owned	462	289	162	11
Leased	13	13	—	—
26,001-33,000 lb GVW				
Total	208	25	171	12
Company-owned	190	9	171	10
Leased	18	16	—	2
Over 33,000 lb GVW				
Total	20	—	7	13
Company-owned	20	—	7	13
Leased	—	—	—	—
Number of gasoline engines				
19,501-26,000 lb GVW	343	188	148	7
26,001-33,000 lb GVW	94	9	82	3
Over 33,000 lb GVW	4	—	—	4
Total	441 (63%)	197	230	14
Number of diesel engines				
19,501-26,000 lb GVW	125	114	8	3
26,001-33,000 lb GVW	38	16	13	9
Over 33,000 lb GVW	16	—	7	9
Total	179 (25%)	130	28	21
Number of propane engines				
TOTAL				
19,501-26,000 lb GVW	7	—	6	1
26,001-33,000 lb GVW	76	—	76	—
Over 33,000 lb GVW	—	—	—	—
Total	83 (12%)	—	82	1
CONVERSION UNITS within total propane engines above				
19,501-26,000 lb GVW	1	—	—	1
26,001-33,000 lb GVW	76	—	76	—
Over 33,000 lb GVW	—	—	—	—
Number CNG engines none				
Miles per vehicle per year (weighted average)				
19,501-26,000 lb GVW	24,306	27,580	18,921	13,727
26,001-33,000 lb GVW	30,362	47,516	27,590	33,500
Over 33,000 lb GVW	99,400	—	108,000	94,769
Stops per day per vehicle (weighted average)				
19,501-26,000 lb GVW	12.1	13.8	8.8	15
26,001-33,000 lb GVW	5.5	6	5	5
Over 33,000 lb GVW	6	—	4	7
Average top speed (weighted average)				
19,501-26,000 lb GVW	46	54	30	46
26,001-33,000 lb GVW	51	50	55	52
Over 33,000 lb GVW	56	—	55	56
Percentage of driving done on interstate or other major highways (weighted average)				
19,501-26,000 lb GVW	31	45	5.7	33
26,001-33,000 lb GVW	60	50	90	60
Over 33,000 lb GVW	93	—	95	92

Life expectancy for vehicles (weighted average)				
<5 years	3%	6.5%	—	—
5-10 years	41.8%	40%	47.3%	5.6%
11-15 years	28.7%	49.5%	5.6%	58.3%
Over 15 years	26.5%	4%	47.1%	36.1%
New truck purchases planned in next 12 months				
19,501-26,000 lb GVW	13	12	1	—
26,001-33,000 lb GVW	—	—	—	—
Over 33,000 lb GVW	2	1	1	—
Engines powering these new trucks				
GASOLINE				
19,501-26,000 lb GVW	1	—	1	—
26,001-33,000 lb GVW	—	—	—	—
Over 33,000 lb GVW	1	—	1	—
DIESEL				
19,501-26,000 lb GVW	12	12	—	—
26,001-33,000 lb GVW	—	—	—	—
Over 33,000 lb GVW	1	1	—	—
PROPANE	none			
CNG	none			

Total tractors	3,330	2,708	281	341
Total trailers	4,802	3,620	712	470
2-axle tractors				
Total	2,694	2,318	190	186
Company-owned	1,837	1,583	150	104
Leased	857	735	40	82
3-axle tractors				
Total	636	390	91	155
Company-owned	259	169	32	58
Leased	377	221	59	97
Trailers				
Total	4,802	3,620	712	470
Company-owned	3,690	2,784	561	345
Leased	1,112	836	151	125
Gross vehicle weight				
Approximate maximum gross weight at which tractors normally operate: actual weight, including fully-loaded trailer, rather than registry weight (weighted average)				
2-axle tractors	52,407	52,667	52,774	49,341
3-axle tractors	72,171	70,214	75,278	75,309
Number of gasoline engines				
2-axle tractors	16	5	5	6
3-axle tractors	—	—	—	—
Number of diesel engines				
2-axle tractors	2,674	2,309	184	180
3-axle tractors	603	390	91	155

Number of propane engines				
TOTAL				
2-axle tractors	4	4	—	—
3-axle tractors	—	—	—	—
CONVERSION UNITS within total propane engines above	none			
Miles per vehicle per year (weighted average)				
2-axle tractors	71,352	73,474	45,839	71,163
3-axle tractors	92,017	90,389	72,009	107,832
Stops per day per vehicle (weighted average)				
2-axle tractors	7	4.8	6	12
3-axle tractors	5.1	5.3	3	4
Average top speed (weighted average)				
2-axle tractors	55	56	45	54
3-axle tractors	57	57	53	58
Percentage of driving done on interstate or other major highways (weighted average)				
2-axle tractors	78	78	71	77
3-axle tractors	82	86	72	77
Life expectancy for tractors (weighted average)				
<5 years	6.7%	4.0%	—	30.8%
5-8 years	6.9%	0.4%	25.7%	42.5%
9-12 years	64.7%	74.8%	25.2%	18.5%
Over 12 years	21.8%	21.3%	49.1%	8.2%
New tractor and/or trailer purchases planned in next 12 months				
2-axle tractors	165	125	15	25
3-axle tractors	38	32	—	6
Trailers	220	147	33	40
Engines powering these new trucks				
GASOLINE				
2-axle tractors	none			
3-axle tractors	none			
DIESEL				
2-axle tractors	165	125	15	25
3-axle tractors	38	32	—	6
Number of trailers				
Single-axle	768	593	64	111
Tandem-axle	3,667	2,816	640	211
Refrigerated	315	191	2	122
Dry bulk	52	20	6	26
Age of trailers				
<5 years	1,240	957	108	175
5-10 years	1,581	938	462	181
11-15 years	924	741	89	94
Over 15 years	221	148	53	20
Unspecified		836		